

ACCOUNT GROUPING IN ONLINE BANKING

Account Grouping is a desktop Business Online Banking feature that lets each user organize the internal accounts they can access into a custom view. Unlike Favorites, which are controlled by the business admin, account groups are created and managed by each individual user.

Business Admins have access to all TINs and accounts associated with the Business Online Banking profile, while other users may only have access to specific accounts assigned to them. Each user can group the accounts available to them in the way that works best for their own view.

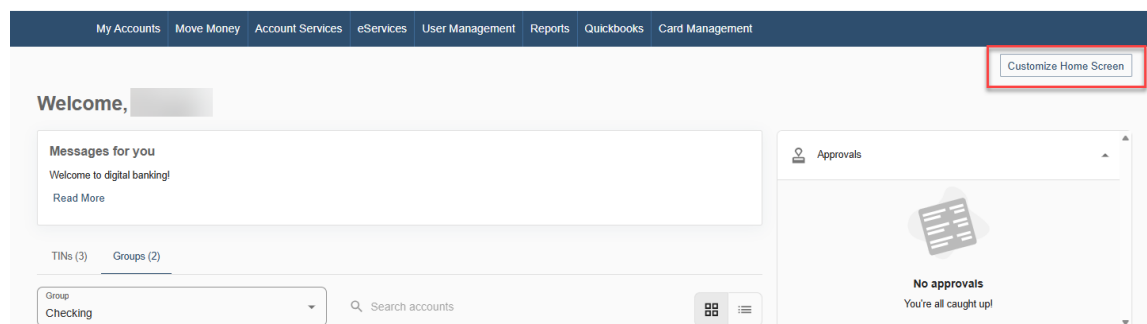
Grouping is supported across all TINs. If a group includes accounts from multiple TINs, the TIN primary name will display with each account for easier identification. Account groups only change how accounts display for that user and do not make any actual changes to the business, account access, balances, transactions, entitlements, or account details.

Before you Begin

- Account Grouping is currently available in desktop Business Online Banking only and not yet available in the mobile app.
- Account groups only customize that user's view in Business Online Banking. They do not make any actual changes to the business or the accounts.
- Grouping is supported across all TINs associated with the business. If a group includes accounts from multiple TINs, the TIN primary name will display with the account for easier organization.

Create an Account Group

1. Log in to desktop Online Banking
2. Select **Customize Home Screen**, then select **Account Preferences**



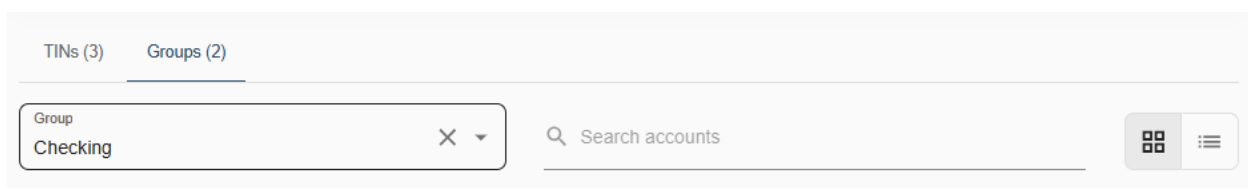
3. Select **Create group**
4. Enter a group name



5. Select the TIN you would like to review, then select the internal accounts you would like to include in the group
6. Continue through each applicable TIN and select the accounts you would like to include before moving to the review step
7. Select **Next**.
8. Review the account order. If desired, drag the accounts into your preferred display order.
9. Select **Review group**.
10. Review the group name and selected accounts
11. Select **Create group**.
12. After the group is successfully created, select the X in the upper-right corner to close the confirmation window and review your groups

View Your Account Groups

1. From the Home screen, the default view will be **TINs**
2. Select **Groups** to view the account groups you have created



3. If you have more than one group, select the group you would like to view using the drop down group menu

Set a Default Group

If you have more than one group, you can choose which group displays by default.

1. Select **Customize Home Screen**
2. Select **Account Preferences**
3. Go to the **Groups** section
4. Select **Edit** for the group you would like to make your default
5. Turn on **Set as default**

6. Select **Next**
7. Review the account order. Once satisfied, select **Review group**.
8. Review your changes, then select **Update group**.

Edit an Account Group

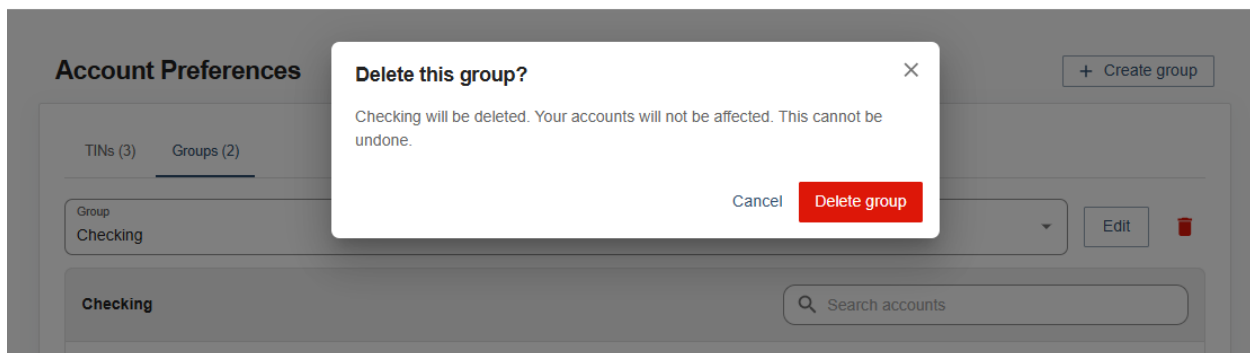
1. Select **Customize Home Screen**.
2. Select **Account Preferences**.
3. Go to the **TINs and Groups** section.
4. Select the group you would like to update using the group drop down arrow

5. Select **Edit**

6. Make your changes. You can update the group name, select additional internal accounts by TIN, remove accounts from the group, or reorder the accounts.
7. Select **Next**
8. Review the account order and once satisfied select **Review group**
9. Review the updates, then select **Update group**.
10. A confirmation will display with a summary of the changes, such as accounts added, removed, or reordered

Delete an Account Group

1. Select **Customize Home Screen**
2. Select **Account Preferences**
3. Go to the **TINs and Groups** section
4. If you have more than one group, make sure the group you want to delete is selected by using the group drop down menu
5. Select the **red trash can icon**
6. A confirmation message will display asking you to confirm that you want to delete the group



7. Select **Delete group** to confirm

Important Note: Creating, editing, or deleting a group does not delete, close, or change any accounts, access, entitlements, or account details. It only changes the custom viewing arrangement within Business Online Banking for that user.